

AGENCY MODULE



- ✓ Profile
- ✓ Aliases
- ✓ Contacts
- ✓ Governance
- ✓ Relationships

Agency

Agency List

Overview: A new provider agency is created in the system by the WITS Administrator. This is the person assigned at the State level to manage the I-SMART system. Each new provider agency is created with minimal information about the name of the agency, display name, agency type, county, and address. One person at the provider agency will take the initial responsibility for being the agency administrator in the system. A login is created for this one agency administrator by the WITS Administrator. This login/User ID is the first entry point for the provider agency to access the system. Once the agency administrator gets the login he/she can then add and revise all information within the agency management modules including setting up all other staff and their access into the system.

- To access the Agency Management modules of I-SMART click on **Agency** on the menu. You will see all the Agency Modules listed in the menu on the left and a list of the Agencies you have access to in the **Agency List** on the right which is usually only your own agency. On right is the WITS administrator's view of the Agency List.

Note: Under the Agency List menu, the only required item to be completed is the Agency Profile along with the address. All other items in that menu are for the convenience of a provider agency and optional to the functioning of the system.

- To edit the **Agency Profile** click on the Agency Profile menu item or click the **Review** hyperlink under **Actions** next to the appropriate agency.

The image displays two screenshots of the I-SMART Training web application, accessed via a Microsoft Internet Explorer browser window.

Top Screenshot: Agency List

The top screenshot shows the "Agency List" page. The left sidebar contains a navigation menu with options: Home Page, Agency List (selected), Agency Profile, Addresses/Phone, Aliases, Contacts, Governance, Relationships, Announcements, Referrals, Removed Consents, Wait List, Facility List, Staff List, Tx Team Groups, Non-Staff Physicians, System Usage, Group List, and Client List. The main content area displays a table of agencies with columns: Name, Display Name, Description, and Actions. The table lists various agencies such as "Bernie Lorenz Recovery Inc.", "Berryhill Center for Mental Health", "Boone County Recovery", "Broadlawn Medical Center", "Capstone Behavioral Healthcare", "Cedar Valley Recovery Services", "Center for Alcohol and Drug Services", "Center for Behavioral Health", "Center for Behavioral Services", "Center for Interpersonal Effectiveness", "Chemical Dependency Services Center", "Clearview Recovery", "Community and Family Resources", "Community Health Care, Inc", "Compass Pointe Behav. Health Serv.", and "Cornerstone Counseling Center". Each row has a "Review" link in the Actions column.

Bottom Screenshot: Agency Profile

The bottom screenshot shows the "Agency Profile" page. The left sidebar is identical to the top screenshot. The main content area contains a form for editing agency information. The form includes fields for Agency Name (A1 Addictions), Display Name (A1 Addictions21), DBA, Agency Type (Private For-Profit), Start Date, Inactive Date, Govt Organization, Consumer Rep Met, Parent Agency, URL, Agency Features (Contract Management, Funding, Reporting, Service Provider), Selected Agency Features, Contract Role, National Provider ID, Federal Tax ID, Agency State ID (33), Contractor/Locator, County (25-Dallas), Geo Code, Pseudo Agency, Senate Dist, House Dist, Cong Dist, Domains (Gambling, SBIRT), and Selected Domains (Substance Abuse). At the bottom right, there are buttons for Cancel, Save, Finish, and Search.

Agency

Agency List

3. **Agency Name, Display Name, Agency Type, Agency State ID** and **County** are the required fields for the Agency Profile. This information will be populated by the WITS administrator in the process of creating your agency. However, you can change the information as appropriate to your agency.

Important Note: If you decide to change your agency name, be sure to notify the state WITS Administrator with the name change. That will allow the state to continue correctly tracking all state-required data.

4. The **Agency Name** is the name that will appear in the **LOC** field (which stands for Location) in the WITS banner at the top of every screen. This can be modified by the user.

5. The **Agency State ID** is a three digit number, is unique to each agency and will be assigned by the WITS Administrator.

6. All other information is optional and can be filled in by the agency administrator as necessary.

Note: All required fields are highlighted in yellow.

The image displays two screenshots of the I-SMART Training web application, a Microsoft Internet Explorer browser window provided by the Iowa Department of Public Health. The top screenshot shows the 'Agency List' screen, which contains a table of agencies. The bottom screenshot shows the 'Agency Profile' screen, which is a form for editing agency information. In both screenshots, required fields are highlighted in yellow.

Agency List Table:

Agency Name	Display Name	Description	Actions
Bernie Lorenz Recovery Inc.	Bernie Lorenz		Review
Berryhill Center for Mental Health	Berryhill		Review
Boone County Recovery	Boone County Re		Review
Broadlawn Medical Center	BMC		Review
Capstone Behavioral Healthcare	Capstone		Review
Cedar Valley Recovery Services	Cedar Valley		Review
Center for Alcohol and Drug Services	CADS		Review
Center for Behavioral Health	CBH		Review
Center for Behavioral Services	CBS		Review
Center for Interpersonal Effectiveness	Cntr Intp. Eff		Review
Chemical Dependency Services Center	Chemical Depend		Review
Clearview Recovery	Clearview		Review
Community and Family Resources	CFR		Review
Community Health Care, Inc	Community Healt	SBRT Agency	Review
Compass Pointe Behav. Health Serv.	Compass Pointe		Review
Cornerstone Counseling Center	Cornerstone Cou		Review

Agency Profile Form:

Agency Name: **A1 Addictions**
 Display Name: **A1 Addictions21**
 DBA:
 Agency Type: **Private For-Profit**
 Start Date:
 Inactive Date:
 Govt Organization:
 Consumer Rep Met:
 Parent Agency:
 URL:
 Agency Features:
 Selected Agency Features:
 Contract Management:
 Funding:
 Reporting:
 Service Provider:
 Contract Role:
 National Provider ID:
 Federal Tax ID:
 Agency State ID: **233**
 Contractor/Location:
 County: **25-Dallas**
 Geo Code:
 Comments:
 Pseudo Agency:
 Senate Dist:
 House Dist:
 Cong Dist:
 Domains: **Gambling**
SBRT
 Selected Domains: **Substance Abuse**

Buttons: Cancel, Save, Finish, Search

Agency

Agency Profile

- To enter the address information for the agency click **Next** on the **Agency Profile** screen.
- You will see the **Addresses** list screen. There will be at least one address documented there by the WITS administrator in the process of creating the agency.
- Click on **Review** to edit the address that was created by the WITS administrator.
- To add additional addresses, click the **Add Address** hyperlink.
- Select the **Address Type** from the drop down list. Enter the **Address Line 1** and **2**, if needed, **City**, **State**, and **Zip Code**. Click **Save** to save this information.
- You can enter another address or click **Finish** if you are done entering address information.
- To add phone number information click the **Add Phone** hyperlink.
- Adding a phone number uses the same process as adding an address. Select the phone number **Type** from the drop down list. Enter the phone number and extension, if needed, and click **Finish** to save the information.

Note: All required fields are highlighted in yellow.

Address Type	Address	Phone	Updated	Actions
Agency Admin. Office	102 1/2 Nile Kinnick Drive South Adel, IA 50003	Work (515) 957-2222	12/29/2006	Review Delete

Type	Number	Actions
Agency Admin	(555) 555-5555	Review Delete
Fax	(555) 555-5566	Review Delete

Agency

Aliases

14. This section keeps a historical record of all the names that the Agency has had since its inception in the system.
15. This list will remain blank if the name of the Agency has never been changed.
16. This list gets automatically filled anytime you edit or replace the name of the Agency in the Agency Profile screen. The previous name of the Agency before you made the change is maintained in this list.

The screenshots show the 'Agency Aliases' section of the I-SMART Training system. The top screenshot shows an empty table with columns for Agency Name/DBA, Created Date, and Actions. The bottom screenshot shows the table populated with two entries for 'Iowa Dept. of Public Health', each with a 'Created Date' of 12/12/2012 and an 'Add Comment' link in the Actions column.

Agency Name/DBA	Created Date	Actions
Iowa Dept. of Public Health	12/12/2012	Add Comment
Iowa Department of Public Health	12/12/2012	Add Comment

Agency

Contacts

17. Click on the **Contacts** menu item. This screen provides the listing of different contact people at the provider agency according to their functions and roles within the agency.
18. To add a new contact click the **Add Contact** hyperlink.
19. Select the **Staff**, **Contact Type**, and **Status** from the drop down list.
20. Enter the **Effective Date**.
21. Click **Save** to save the information. The information you entered will now appear in the List at the top of the screen.
22. If you are finished entering contact information click **Finish**.
23. To review or edit a previously entered contact click the **Review** hyperlink under **Actions**.

Agency Contacts - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

https://tram.ia-smart.org/System.aspx

I-SMART Training User: Schaller, Elizabeth
Loc: Iowa Department of Public Health
Client:

Printable View

November 2012

Logout

Contacts for Iowa Department of Public Health

Contact Type	Name	Status	Created	Effective	Actions
Executive	Cleland, Lonnie	Active	8/26/2007	8/26/2007	Review
Fiscal and Contract Administration	Kryuchkov, Alexander	Active	12/5/2008	12/5/2008	Review
Clinical Licensing	Nwizu, Lilian	Inactive	3/22/2012	3/22/2012	Review
Referral	Coordinator, Data	Active	4/17/2012	4/17/2012	Review

[Add Contact](#)

Staff

Contact Type

Effective Date

Status

Manager Name

Finish

[Add Contact](#)

Staff

Contact Type

Effective Date

Status

Manager Name

Cancel Save Finish

Agency

Governance

24. The general purpose of the Governance menu item is to document your board membership information.
25. To add governance information click the **Add New Governance Record** hyperlink.
26. Enter the **First and Last Name** of the Governance/Board Member. Enter **Title, Federal Tax ID, Email, Start Date** and **End Date** as appropriate.
27. Select the appropriate response for **Gender, Role,** and **Board Member Type** from the drop down lists.
28. To add an **Address** for this record click the **Add Address** hyperlink. Select the **Address Type** from the drop down list. Enter the **Address Line 1** and **2**, if needed, **City, State,** and **Zip Code**. Click **Save** to save this information.

Note: All required fields are highlighted in yellow.

The screenshots show the I-SMART Training web application interface. The first screenshot shows the 'Governance List' with a table containing one record for 'Hodges, Gena' with the title 'Owner'. A red arrow points from the 'Add New Governance Record' link to the second screenshot. The second screenshot shows the 'Governance Profile' form for 'John Rocafella', with fields for First Name, Last Name, Title, Gender, Role, Board Member Type, Federal Tax ID, Email, Start Date, and End Date. A red arrow points from the 'Add Address' link to the third screenshot. The third screenshot shows the 'Address Information' form with fields for Address Type, Address Line 1, Address Line 2, City, State, and Zip Code, and a section for Phone Numbers.

Agency

Governance

29. To add a phone number for this record click the **Add Phone** hyperlink on the **Address** screen.
30. Select the phone number **Type** from the drop down list. Enter the phone number and extension if needed and click **Finish** to save the phone number information.
31. Once you complete this information and Save, this person's name gets added to the Governance list.
32. Click on the **Add New Governance Record** hyperlink for each new member to be added.

Note: All required fields are highlighted in yellow.

The screenshots show the I-SMART Training web application interface. The first screenshot shows the 'Address' screen with fields for Address Type, Address Line 1, Address Line 2, City, State, and Zip. The second screenshot shows the 'Phone Numbers' table with columns for Type, Number, and Actions. The third screenshot shows the 'Governance Profile' screen with fields for First Name, Last Name, Gender, Role, Federal Tax ID, Email, Title, Board Member Type, Start Date, and End Date. A red arrow points from the 'Add New Governance Record' hyperlink in the list to the 'Add Address' button in the Governance Profile screen.

Address Screen:

Address Type: Agency Governance Current
 Address Line 1: 321 E 12th Street
 Address Line 2:
 City: Des Moines State: Iowa Zip: 50319

Phone Numbers Table:

Type	Number	Actions
Work	(515) 624-8741 x126	Review Delete
Fax	(555) 234-5678	Review Delete

Governance Profile Screen:

First Name: Gena MI: Last Name: Hodges
 Gender: Title: Owner
 Role: Board Member Type: Advisory
 Federal Tax ID: Start Date: End Date:

Address List Table:

Address Type	Address	Phone	Updated	Actions
Agency Governance Current	321 E 12th Street Des Moines, IA 50319	Work (515) 624-8741 x126 Fax (555) 234-5678	12/5/2008	Review Delete

Agency

Relationships- Disclosure

The purpose of the agency level disclosure agreement is to be able to set up standard items for disclosure between agencies with which you work on a regular basis. A client consent is always needed in addition to the agency disclosure agreement. Once an agency disclosure agreement is created the information will serve as the default on the client consent screen. The client consent can be modified as needed in the client consent screen.

1. Click on the **Relationships** menu item and then click **Disclosure**.
2. You will see the **Agency Disclosure Domain List**.
3. To add a new disclosure agreement click the **Add Agency Disclosure Domain Record** hyperlink.
4. Select the **Disclosing** and **Receiving Agency** from the drop down. Disclosing agency is your own agency since you cannot setup policies for other agencies.
5. Answer the **Global Policy** and **Always Verify Consent** questions.
 - Global Policy: Will this set of rules apply to all agencies in the disclosure list? If not, the answer is No.
 - Always Verify Consent:: Must the clinician verify that a consent exists and has been signed by the client before making a referral? If so, the answer should be Yes.

The screenshots illustrate the process of adding a new agency disclosure agreement. The top screenshot shows the 'Agency Disclosure Domain List' with a table of existing records and an 'Add Agency Disclosure Domain Record' link. The middle screenshot shows the 'Agency Disclosure Domain' form with dropdowns for 'Disclosing Agency' and 'Receiving Agency', and checkboxes for 'Global Policy' and 'Always Verify Consent'. The bottom screenshot shows the 'Disclosure Domain Selection' section with radio buttons for 'Consent Options' and 'Consent Expires Upon'.

Agency Disclosure Domain List

Consents Granted By	Consents Granted To	Actions
Iowa Department of Public Health	All Other Agencies	Review Delete
Iowa Department of Public Health	Fifth Judicial District	Review Delete
Iowa Department of Public Health	Administrative Agency	Review Delete

Agency Disclosure Domain

Disclosing Agency: **Iowa Department of Public Health**
 Receiving Agency: **Iowa Department of Corrections**
 Receiving Entity (Non System Agency):
 Global Policy? (Available To All Agencies): **No**
 Always Verify Consent?: **No**

Disclosure Domain Selection

Consent Options: ☐ Admission ☐ Client Information (Profile) ☐ Consent ☐ Discharge ☐ Encounter Detail ☐ Intake Transaction

Consent Expires Upon: ☐ Discharge(UD) +Days: ☐ Date Signed(DS) +Days:

Comments

Agency

Relationships- Disclosure

- Select the **Consent Options** by holding down the CTRL key and clicking on the options. Then select the appropriate **Consent Expires Upon** choice and click the right pointing arrow. The information you selected will now appear in the **Selected Options** box.
- Click **Finish** when you are done. This will take you back to the list screen and you will see the record you added on the list. To review or edit a record click the Review hyperlink under **Actions**.

Agency Name	Consents Granted By	Consents Granted To	Actions
Iowa Department of Public Health	Iowa Department of Public Health	All Other Agencies	Review Delete
Iowa Department of Public Health	Iowa Department of Public Health	Fifth Judicial District	Review Delete
Iowa Department of Public Health	Iowa Department of Public Health	Administrative Agency	Review Delete
Iowa Department of Public Health	Iowa Department of Public Health	Iowa Department of Corrections	Review Delete

Agency

Sample Consent Screen

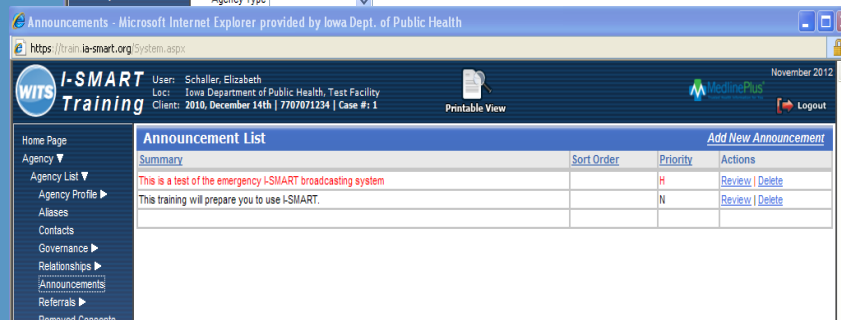
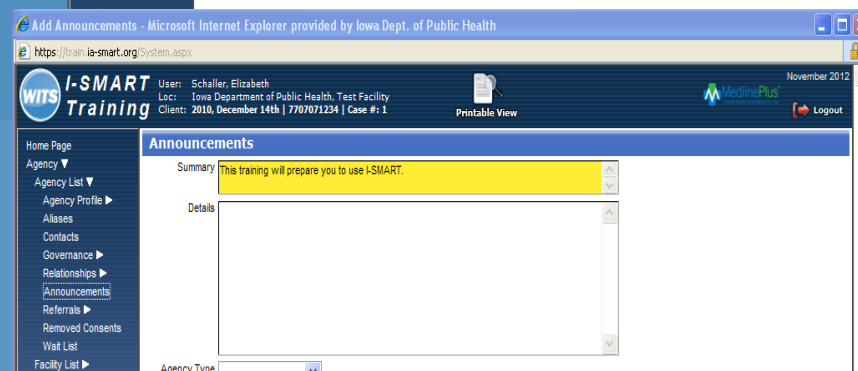
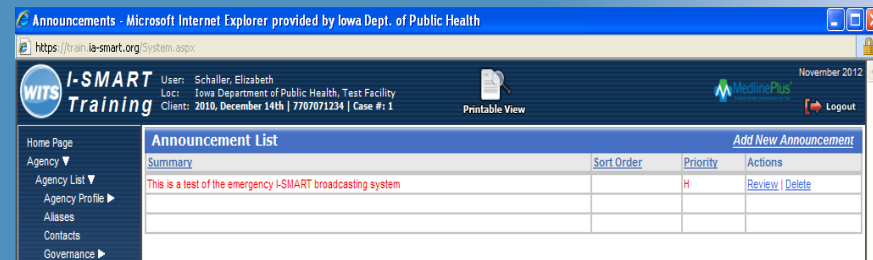
This is an example of what the client consent screen looks like. You will notice that there is a drop down for “Entities with Disclosure agreements”. This is a list of your Agency Disclosure Agreements as defined in the previous slide.

Choosing one, causes the form to pre-populate with the conditions of the disclosure agreement. **It can be customized for this instance of the consent.**

Agency

Announcements

1. Click the **Announcements** menu item. You will see the **Announcement List**. You can use this section to post or edit announcements on your home-page.
2. To add a new announcement click the **Add New Announcement** hyperlink.
3. Enter a summary of the announcement in the **Summary** field. This will appear on the **Announcements List** screen under the **Agency** module and on the **Announcements** screen of the **Home Page**.
4. Enter the **details** of the announcement, the **start date** and the **end date**. The **start** and **end date** will determine when the announcement is displayed on the **Home Page**.
5. Select the appropriate response for **Agency** (usually your own agency only) and **Priority** from the drop down list. **Leaving the Agency blank, causes the message to appear for all Agencies.**
6. The **Created By** and **Created Date** will be filled by the system and are read only fields.
7. Click **Finish** when you have entered all of the appropriate information for the announcement. This will take you back to the list screen and you will see the announcement you entered listed.
8. To review the details of an announcement or to edit an announcement you created click the **Review** hyperlink under **Actions** next to the appropriate announcement.



Agency-Referrals

Referrals In

1. To review a list of clients who have been referred to your agency click on **Referrals** and then **Referrals In**.
2. A list of all clients who have been referred to your agency will appear. To review the more detailed information for a particular referral click the **Review** hyperlink under **Actions**.

I-SMART Training - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

https://train.ia-smart.org/System.aspx

User: Schaller, Elizabeth
Loc: Iowa Department of Public Health, Test Facility
Client: 2010, December 14th | 7707071234 | Case #: 1

Printable View

November 2012

Referrals for Test Facility (Export)

Referral Status Codes **Search Criteria**

Placed/Accepted
Referral Created/Pending
Referred Terminated
Refused Treatment

Client Id Created Date Referred Date

First Name Last Name

Client ID	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments	Actions
6601011234	Client, Rodneys	1/1/1966	12/16/2008	Westat Testing Agency/Test facility	Extended outpatient	Placed/Accepted	Test Facility		Review
0901272222	Hood, Robin	1/27/1977	1/30/2009	First Resources Corporation/Court St.	Intensive outpatient	Placed/Accepted	Test Facility		Review
4903159999	Loaded, Bob	3/15/1949	1/30/2009	First Resources Corporation/Court St.	Extended outpatient	Placed/Accepted	Test Facility		Review

I-SMART Training - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

https://train.ia-smart.org/System.aspx

User: Schaller, Elizabeth
Loc: Iowa Department of Public Health, Test Facility
Client:

Printable View

November 2012

Client Referral for Hood, Robin

Referred By

Agency First Resources Corporation
Facility Court St.
Staff Member Murphy, Judy
Program 20-Court St/Intensive Outpatient : 1/29/2009 - 1/30/2009
State Reporting Category Adult Outpatient
Reason Level of care not available at this facility
If Other
Is Consent Verification Required? Yes
Is Consent Verified? Yes
Continue This Episode of Care? Yes

Referred To

Signed Consents Iowa Department of Public Health
Agency Iowa Department of Public Health
Facility Test Facility
Staff Member
Program Intensive Outpatient (I)
State Reporting Category Adult Outpatient
Non-System Agency
Non-System Modality
Non-System Specifier
Appt Date 6/10/2010 Confirmed
Consents Granted
Consent Date: 1/30/2009
Disclosure Domains:
Treatment Plan (DS, 3/1/2009)

Comments

Referral Status Placed/Accepted
Projected End Date
Created Date 1/30/2009 10:24 AM

Agency-Referrals

Referrals Out

- To review a list of clients who have been referred to other agencies by your agency click on **Referrals** and then **Referrals Out**.
- A list of all clients who have been referred by your agency will appear. To review the more detailed information for a particular referral click the **Review** hyperlink under **Actions**.

Referrals from Test Facility (Export)

Referral Status Codes: Placed/Accepted, Referral Created/Pending, Referral Terminated, Refused Treatment

Search Criteria: [Empty]

Client Id: [Empty] Created Date: [Empty] Referred Date: [Empty]

First Name: [Empty] Last Name: [Empty]

Clear Go

Name	Created Date	Referral Status	Referred To Agency	Referred To Facility	Non System Agency	Referred To Modality	Referral Comments	Actions
O'2009, July 7	7/9/2009	Referral Created/Pending	Iowa Department of Public Health	Test Facility		Intensive outpatient		Review
Cottonail, Jack	2/17/2012	Referral Created/Pending	Cornerstone Recovery	Cornerstone		Extended outpatient		Review

Client Referral for O'2009, July 7

Referred By:

- Agency: Iowa Department of Public Health
- Facility: Test Facility
- Staff Member: McCreery, tonia
- Program: 15-Test Facility/Stone's Residential : 7/7/2009 - 7/7/2009
- State Reporting Category: Adult Residential
- Reason: Managed care decision
- If Other: [Empty]

Is Consent Verification Required? Yes

Is Consent Verified? No

Continue This Episode of Care? Yes

Comments: [Empty]

Referral Status: Referral Created/Pending

Projected End Date: [Empty]

Created Date: 7/9/2009 10:08 AM

Referred To:

- Signed Consents: [Empty]
- Agency: Iowa Department of Public Health
- Facility: Test Facility
- Staff Member: [Empty]
- Program: Intensive Outpatient (I)
- State Reporting Category: Adult Outpatient
- Non-System Agency: [Empty]
- Non-System Modality: [Empty]
- Non-System Specifier: [Empty]
- Appt Date: [Empty] Undetermined
- Consents Granted: [Empty]

Cancel Finish

Agency - Waitlist

Wait List

1. To review a list of clients on the **Wait List** for your agency click **Wait List**.
2. A list of all clients on the **Wait List** for your agency will appear. The list can be sorted by any of the column headings by clicking on the column heading.
3. To review the details of a particular record click the **Review** hyperlink under **Actions**.

I-SMART Training - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

https://train.ia-smart.org/System.aspx

User: Schaller, Elizabeth
Loc: Iowa Department of Public Health, Test Facility
Client:

Printable View

November 2012

Logout

Wait List

Full Name	Program	Staff	Pregnant	Due	Dual Diag.	HIV	IV Drugs	Interim Ser	Placement Asst	Start Date	Actions
Example, Manual	Extended Outpatient		No				No			12/12/2012	Review

Client Wait List for Example, Manual

Agency: Iowa Department of Public Health
Facility: Test Facility
Select Program: Extended Outpatient
Select Staff:
Modality: 19-Extended outpatient
Wait Start Date: 12/12/2012
Wait End Date:
Added to Wait List By: Schaller, Elizabeth
Dually Diagnosed?:
Assistance Needed to Place This Client:
Patient is Injecting: No
Referred to Interim Services:
Patient is Pregnant: No
HIV Positive:
Due Date:
Priority Code:
Ready Date:
Removed From Wait List By:
Reason:
Comments:
[Admit Client](#)
Cancel Save Finish